



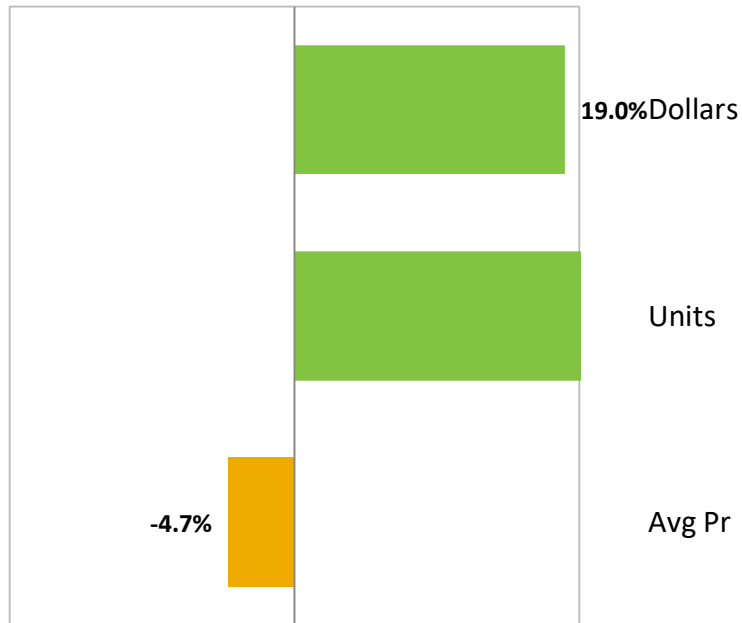
ATA Report

January 2018

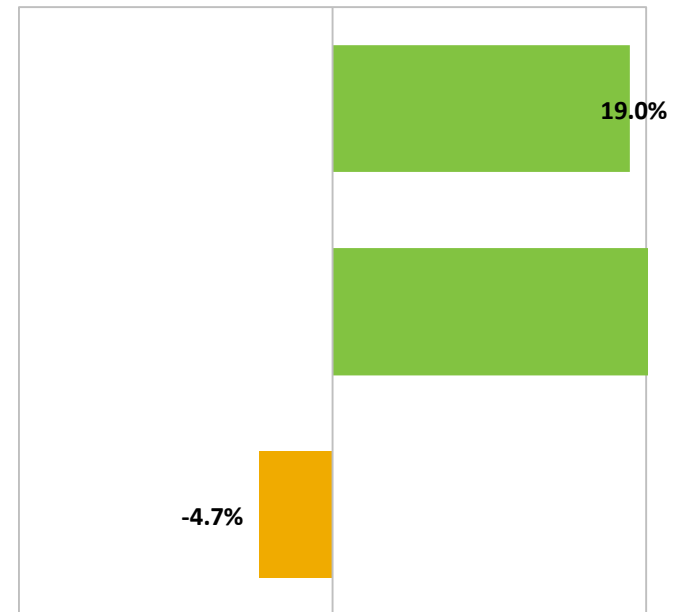
Australia Toy Association

Industry Trends

January Toys performance saw a significant increase against last year (+19%), though this is driven by 2018 having an extra week in the calendar vs. 2017. The decline in the average retail price of **-4.7%** is an industry trend carried over from 2017 which saw retailers drive price tiers down, as well as an increased number of SKUs in the lower price brackets (fuelled by the popularity of Collectibles and Assortment packs).



January % Change YOY

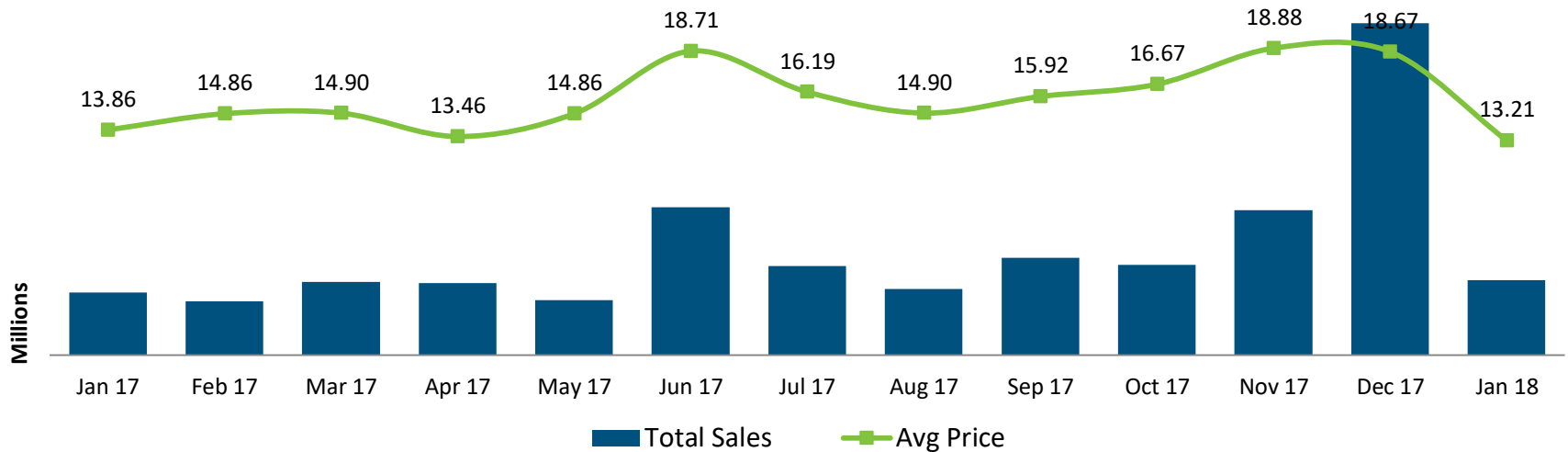


YTD % Change YOY

Monthly Trend

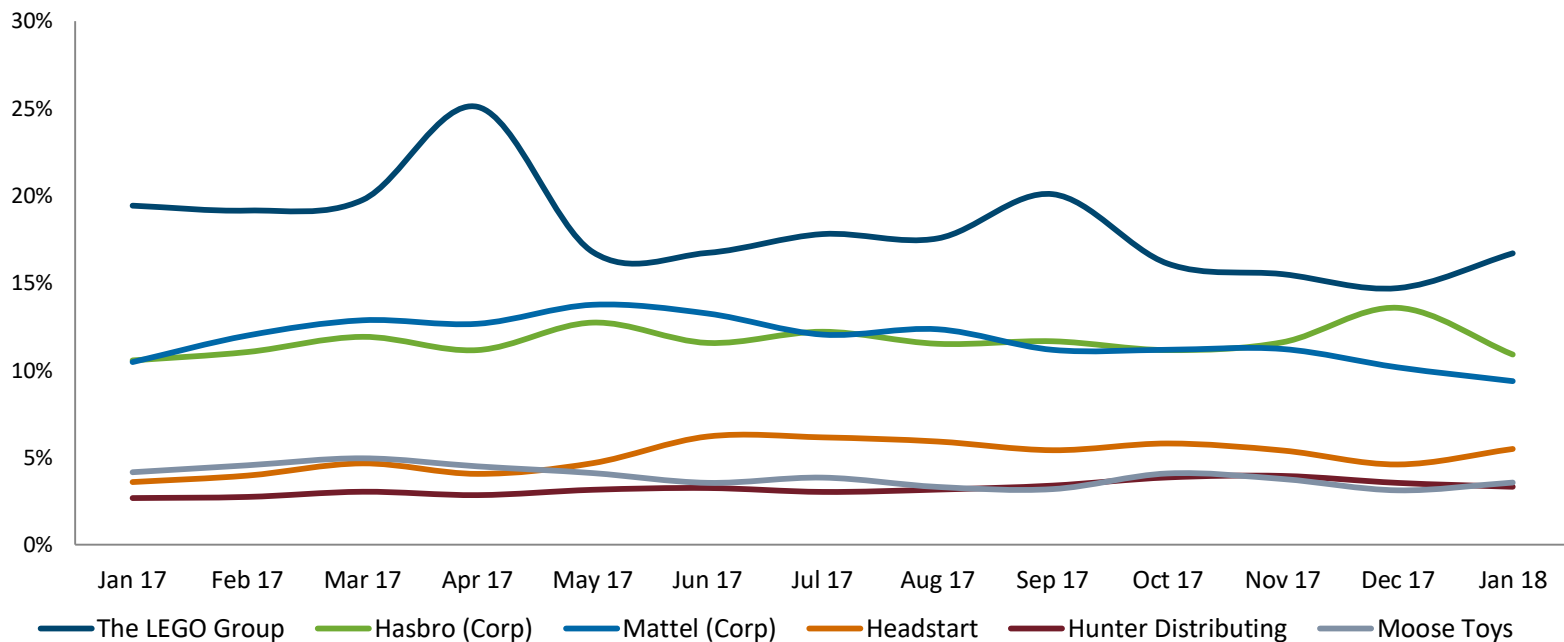
Following a trade up into a higher price point in the lead up to and during Christmas, the average price point for January 2018 has now fallen significantly. January's average retail price of \$13.21 is the lowest price point per Toy item for the past 13 months.

Monthly Value (\$m) and Average Price (\$)



Corporate Manufacturers Trends

Hasbro overtook Mattel in the full year 2017 to become #2 manufacturer after Lego. Although Hasbro's performance dipped in January, they are still by far the 2nd biggest player in Toys. Lego has improved its performance in January, as has Headstart who in 2017 had overtaken Moose as the leading supplier of Collectibles on the back of the success of L.O.L. Surprise!

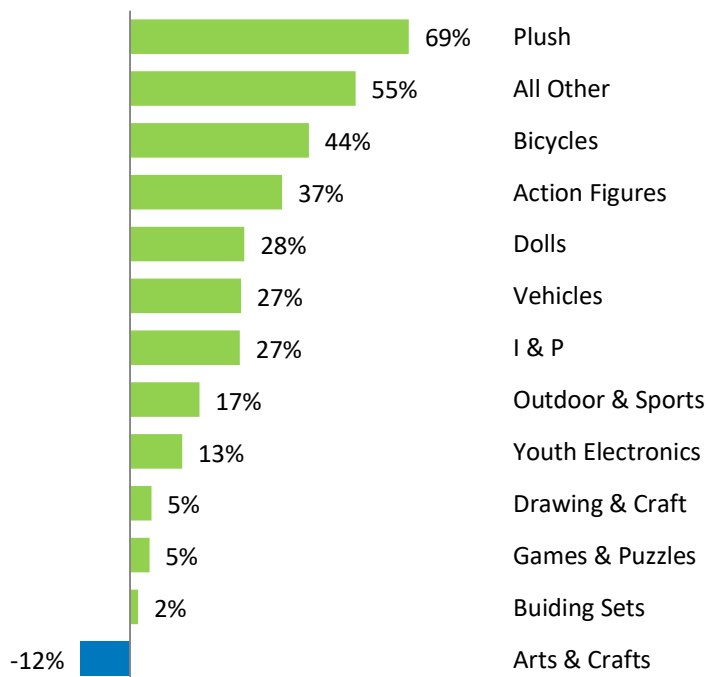


Top Distributors rank by Market Share

Category Trends

Most supercategories have seen growth in January vs. the prior period. This is led Plush which was the fastest growing supercategory in 2017 (+25% YOY). All Other Toys has also seen significant growth in the full year 2017 and its strong performance continues into January, driven again by Ooshies, Fidget Toys and Key Chains (Hatchimals and Ty Beanie Boos).

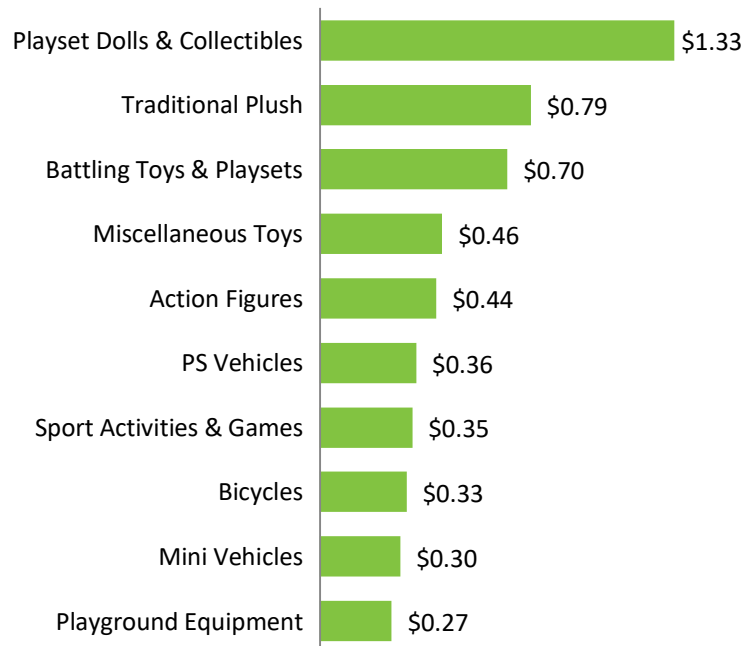
Value Change YTD



Subclass Trends

The Playset Dolls and Collectibles subclass continues to lead the growth of Toys on the back of Headstart's L.O.L. Dolls! Traditional Plush has overtaken Special Feature Plush growth in January, following stronger performance by Special Feature throughout 2017. Battling Toys & Playsets growth is driven by Hasbro's Beyblade (which helped grow Hasbro's share of the subclass in 2017 from 44% to 54%).

Fastest 10 Growing Subclass by Value-added YTD (\$MM)



Fastest 10 Declining Subclass by Value-lost YTD (\$MM)



For more information

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